Self-service delivers channel shift in revenues

City of Lincoln Council provides a joint revenues and benefits service for itself and North Kesteven District Council. A shift to online forms has delivered over £84,000 in savings, a 36 per cent increase in self-serve web traffic for these services, and an uplift in collection rates increasing income across both councils by almost £85,000.

The issue and context

In response to the financial constraints facing all councils, City of Lincoln has looked to automate processing in back-office functions and focused on making it easier for people to get what they want or need from the council as quickly and efficiently as possible.

The council operates a high-volume shared service for revenues and benefits between itself and North Kesteven District Council serving approximately 100,000 households. The service underwent a review in 2016 to identify where the customer experience could be enhanced and where savings could be made to contribute to City of Lincoln's 'Towards Financial Sustainability' targets

This review identified that over 70 per cent of transactions could be categorised into just five themes – all of which had the potential to be transformed into low-cost self-service offerings:

- report a move/student occupancy changes
- set up/change a direct debit
- make a payment
- request a discount
- register for paperless billing.

Lincoln had already had some success with online forms in revenues and benefits. For example, since the introduction of a 'report a move' form in April 2016, 46 per cent of all moves had been submitted online. The council believed that this clearly indicated an appetite for local customers to self-serve.

"We have had a long-held ambition to make the processing aspects of our work more efficient for customers – primarily to make it easier for people to get what they want from the council quickly and efficiently. But also, in these times of financial constraint, we need to be able to demonstrate that we have services that are efficient and are provided at the lowest possible cost. There's a win-win in this – it is better for our customers and better for the organisation in terms of making savings."

Councillor Ric Metcalfe, Leader of the Council

As this online report a move form had also dramatically reduced processing times − from 26 days to just seven − Lincoln also believed that there were further opportunities to significantly improve processing efficiency by integrating self-service forms directly into back-office systems.

In order to build on this success Lincoln applied to the LGA Digital Channel Shift Programme for funding to integrate the online offer directly into its revenues and benefits system and to create a suite of options for customers to self-serve, including:

- signing up for e-billing
- reporting a move (including landlords)
- setting up direct debits
- amending direct debits

Digital Channel Shift Programme

The work at City of Lincoln Council to support its innovative use of digital technology has been funded through the Digital Channel Shift Programme, which is managed and overseen by the Local Government Association (LGA).

The Digital Channel Shift Programme was set up to help councils and their partners to promote greater use of online tools and technologies for the benefit of both their customers and staff.

The aim is for the digital tools and solutions created through the programme to be reused by other councils and contribute to the wider work to transform local public services.

- applying for discounts
- making student tenancy changes.

The goal would be to replicate the success of previous online form take-up across the suite of new revenues and benefits self-service forms and provide a true one-stop experience for customers.

Specifically, the LGA funding would be used to release already skilled and experienced in-house technical resource for further technical training in order to deliver the new forms and integrations with back-office systems.

"It's all about pace. We have great skills and lots to do but only have limited capacity. The LGA funding enabled us to actually pull a couple of people out, train and skill them up further and actually deliver the project at pace ourselves."

Angela Andrews, Chief Executive

The project objectives and targets

As a council, Lincoln believes that channel shift is essential in order to meet the requirements of a changing world. People use digital services – from social media to online shopping – on a daily basis and expect the same, easily accessible and frictionless services to be available from their local council.

Therefore, the project aimed to ensure that all revenues services would be available for self-service by December 2017.

This project was expected to deliver the following outcomes:

- better, easier-to-use online services for customers
- increase in the use of online services as a result of positive customer experience
- a reduction in customer demand by telephone and face-to-face
- reduced processing times
- a reduction in printing and postage costs through increased uptake in e-billing for revenues
- extra capacity released in teams.

Monitoring

The prior service review had identified the amount of staff time it took to complete each transaction and worked out an accurate cost based on salary. SOCITM estimates were used to calculate the cost of both face-to-face and telephone transactions.

The aim was to build Google Analytics into every form to record the customer journey and monitor the usage/uptake for revenues and benefits. Ongoing performance and project delivery would be measured as follows:

- call volumes relating to these transactions
- telephony queue times
- end-to-end times for the transactions identified
- cost of postage for billing
- reduction in footfall.

"The focus is on improving the customer experience and improving the lives of the people we serve – that's what our job is. Technology is a tool to help us do that and we need lots of bright people with innovation and creativity to help us do that. Our policy has been to develop and grow our own – we've got a team of people that we have been trying to develop, retain and use those skills across the organisation. We are here to serve our communities and technology is a tool that can help us do that better."

Angela Andrews, Chief Executive

Targets

- A 30 per cent reduction in call answering and processing times across both councils' revenues and benefits services potentially delivering approximately £35,000 in savings.

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The approach and progress to date

The project team applied design principles aligned to the GOV.UK website developed by the Government Digital Service in line with their commitment to making the councils' online services as accessible and usable as possible.

One priority was replacing the email service for notifying the revenues team about changes in circumstances. Due to increased activity on both councils' websites the team had been receiving upwards of 200 emails a day. The majority of these emails contained vague details about changes to people's addresses or accounts, but failed to contain all relevant information. This necessitated multiple subsequent email exchanges in order for the team to elicit all the information required to log the requested change on the system

Directing such email requests to online forms that would prompt for completion of all required information was therefore the priority.

Leadership and governance

Lincoln has been focused on improving the customer experience for a number of years, and both the chief executive and leader of the

"In the shared service we have one email address for both councils and we've found that to be fairly close to unmanageable. We are just bombarded by customers all day long telling us stuff by email and expecting an instant response. We were looking for a way to automate the email service so that it wasn't a free-format – as it's not unusual for us to receive an email saying 'I'm getting married can you tell me what to do, thanks Tracey' and we don't know who it relates to, we don't know where they live, we don't know anything about them other than their email address and they're getting married!

"We needed a way to ensure that people couldn't give us part of the information – they could only give us all of the information, in the format that we wanted. An automated form seemed the obvious way to do that."

Bob Wagstaff, Council Tax Team Leader

"Leadership is important. Both the chief executive and myself have been champions of channel shift for a long time. In fairly traditional working-class cities like Lincoln these things take more time because people do need time to countenance the possibility of change. But once you get across the benefits in terms of quicker and more efficient services, access 24/7 for customers and you can show some financial savings, who wouldn't want to do it?"

Councillor Ric Metcalfe, Leader of the Council

council are champions of channel shift for the services the council provides.

The project reported to Lincoln's customer experience board, which is led by the chief executive and comprises the heads of customer services and communications along with key managers from within service areas.

Technology

The City of Lincoln uses a Northgate Public Service (NPS) council tax system and Firmstep forms tools.

A key part of the project would involve integration of the NPS system APIs (application programming interfaces) with the online forms in order to enable information entered by the citizen to be automatically recorded and updated in the back-office system.

The team knew that XML (a software- and hardware-independent tool for storing and transporting data) would be needed in order to achieve this, yet it had no prior knowledge of the tool.

In previous projects the team had encountered additional expense and delay caused by lack of in-house knowledge and over-reliance on suppliers and external consultants. Keen to avoid repetition of such issues, the team wished to develop in-house skills and ongoing self-sufficiency in this area. Two key project members therefore attended an advanced XML

training course in May 2017 in order to gain the skills needed to begin working on the forms and integration.

The revenues service is subject to natural workload peaks around, for example, the annual billing cycle and the start of the student academic year at the University of Lincoln. At such times revenues officers are inundated with producing bills and handling direct debit queries or move requests from landlords for students moving in or out of their accommodation.

A natural place to start the project therefore was development of an e-billing, or paperless billing, form. This offered both a good test bed for developing skills and methodology and quickly releasing capacity ahead of the next billing round.

After e-billing, the development team felt that the direct debit form was another quick win. During its creation they discovered that the NPS API offered both update and creation functionality. The opportunity was therefore taken to incorporate both capabilities – create and update - into the direct debit form.

The student tenancy moving form developed next can now be used by landlords to update the council about student moves. It automatically creates the tenants in NPS, completes the move and applies the appropriate discounts – again releasing substantial capacity for the revenues team.

Thanks to the detailed revenues service review previously undertaken, the team was already aware of some of the logic that advisors use when they are speaking to customers. This logic was built into the new forms to ensure that forms collected the same information as advisors did on their calls.

For example, when a customer calls to set up a new direct debit, but already has one in place, the advisor is aware of this and merely updates the existing facility. The new form contains the same logic and prompts the customer to change an existing direct debit rather than set up a new one.

Logic mitigating the risk of fraud was also built into the forms. For example, if a customer is already facing recovery action for non-payment, the form will not allow a new direct debit to be set up as a way of avoiding recovery action.

"We used the LGA funding to go on the XML training to give us the skills to deliver these projects. We wanted re-usable in-house skills as dealing with third-party suppliers and consultants has not always been a positive experience. Having the skills in-house would also allow us to continue at the pace we wanted to."

Fraser Trickett, Senior Business Analyst

Also, if a change has been made more than twice within a four-week period, the form will not allow a change to go through and the customer will be asked instead to ring an advisor.

User research and testing

As the focus was on releasing capacity by helping digitally capable customers to self-serve, the team opted to use the council staff as an easily accessible pool of people for user research – the majority of both councils' staff are also end-users of the revenues and benefits services, and they are demonstrably digitally-capable in that they already use online services in their daily life.

Workshops with the revenues teams then brought in expert user knowledge to ensure that the forms complied with legislation and captured all information required for processing.

A satisfaction survey was built into all forms to enable the capture of information for ongoing research and iteration. For all live forms customers are currently reporting around 95 per cent satisfaction. However, the team monitors all feedback for trends and rapidly picks up on anomalies for investigation and remediation.

To date the forms average 4.5 stars out of five and, interestingly, negative comments tend to relate to council policy or the level of council tax rather than the actual form.

In addition, integration or other technical failures are monitored via analytics. This provides information, for example, on whether customers add information in unexpected formats, enabling field validation to be rapidly

tweaked to either accept the entry or prompt for a different format to be entered.

Shared services

The forms platform has successfully been implemented across the shared revenues service for residents in the City of Lincoln and North Kesteven, accommodating local variance such as different direct debit dates. Customers for either council are not aware of the behind-the-scenes processing and receive the same level of service wherever they live.

Promotion

There was no specific communications plan for this project, rather an overall objective of using opportunities across both councils' existing communications with residents to promote the availability of new self-serve options as they were delivered.

Activity undertaken includes:

- direct emails sent to customers using garden waste services alerting them to the new services they could now also use

- emails to all council tax customers who had previously provided email addresses, inviting them to self-serve

- easy-to-follow URLs included on bills and other printed material relating to the service

- telephone numbers were removed as appropriate and replaced with URLs on relevant council literature

- logic within forms promoted services to customers they had not yet signed up to. For example, paperless bills include a link to sign up for direct debit payment where customers had a history of paying their bills by cash; while the move forms provide links to both the single person discount application and direct debit creation

- all new forms were integrated into both councils' customer portals so that customers across both areas could see and access the new services

- landing pages were created for each form to help with both Google searches and bounce rates, as customers are made aware of requirements before proceeding

"We identify customers who are able to self-serve and promote other online services. For example, if a customer registers for our garden waste service online, and we can see that the customer is paying for their council tax by a non-direct debit method, we contact the customer to suggest they move to direct debit − as they've paid by card for their garden waste."

Fraser Trickett, Senior Business Analyst

- keyword lookups were added to forms so that Google and council website searches would display the correct relevant pages regardless of search terms used. For example, entry of any of the following will lead to the direct debit form: DD, direct, debit, direct debit

- a new 'contact us' form on the website has the ability to offer suggestions to the customer about how they can complete their request online instead of contacting the council – for example, if a customer types in 'I would like to contact you about a direct debit' the customer will be told 'did you know you could do this online?' and be offered the relevant forms

- social media campaigns were run on each new form by the councils' social media teams.

The most successful campaign that the team ran was using existing knowledge about customer behaviour to offer additional services. For example, when customers applied for the garden waste service a question within the form asked customers if the council could contact them regarding other council services using that email address. Where permission was given, newly available services were successfully 'pushed' to the customer.

Interestingly, the team found that as part of this email push campaign, the peak time for responses and action was at 10.00 am. The team surmised that this was the point in the morning when people took a coffee break, having been in work for a few hours, and looked at their mobile phones. Taking advantage of this user behaviour the team opted to schedule such emails in future to land in people's inboxes ahead of 10.00 am.

Project milestones	Planned	Actual	Comments
e-Billing registration	Not part of original Project	Mar 17	Opportunity arose to include as a quick win
Set up a direct debit form	Jul 17	Aug 17	Some additional refinements completed
Change a direct debit form	Not part of original Project	Aug 17	Added as a relatively minor change offering significant extra benefit
Apply for single person discount	Sep 17	Nov 17	Additional refinements made to ensure the branding on the service page reflected the authority area in which the user lives
Report a move	Dec 17	Feb 18	Full integrations in place subsequently Dec 18
Landlord move form	Not part of original Project	Jan 18	Saves significant resources during a set period of the year
Student changes	Dec 17	Feb 18	

Make changes to a Council Tax Direct Debit

Council Tax Direct Debit changes for City of Lincoln

You can use this service to make changes to your direct debit for your Council Tax account.

You can only use this service if you are the named account holder on the account.

You can update:

- Your bank account details
- Your instalment date

Instalment changes

Be aware that if your current scheduled payment is due to be taken within the next 10 days this payment will still be taken. Your new date will then take effect from the next month.

Before you start

To use this service you will need:

- Your Council Tax account number - you can find this on your bill, your account number is 9 digits long
- Your address and postcode

Start changes to your direct debit

Council Tax
More information for Council Tax

CITY OF Lincoln COUNCIL

GODADDY.COM®
VERIFIED & SECURED
VERIFY SECURITY

Notify us of a student occupied property

Notify us of students in a property in Lincoln

You can use this service to tell us about students you have living in a property in Lincoln.

Our Council Tax team will then review this information and apply exemptions to your bill where appropriate.

This service is for landlords and agents only.

Before you start

To use this service you will need:

- Address and postcode of your property
- Full name of each tenant (both students and non-students)
- The name of educational centre that the students are enrolled at
- The student reference/enrollment number
- Start and end date of each tenancy

Start your student occupation notification

Landlords and agents
More information for landlords

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VERIFY SECURITY

RESIDENTS BUSINESS VISITORS YOUR COUNCIL JOBS COUNCIL TAX LOGIN

North Kesteven
DISTRICT COUNCIL

Apply for single person discount

| Your details | Account details |

Introduction

You are able to apply for Single Person Discount if you are the only person over the age of 18 living in a property and it is your only or main residence you can claim a 25 per cent discount on your council tax bill. This form is not to report if someone has moved out of your property. If you need to report a move please use this online form.

You will no longer be entitled to this discount if;

- Someone over the age of 18 moves in to your property
- A child living in your property reaches the age of 18

Are you applying for single person discount because someone has moved out of the property? *

○ Yes ○ No

RESIDENTS BUSINESS VISITORS YOUR COUNCIL JOBS COUNCIL TAX LOGIN

North Kesteven
DISTRICT COUNCIL

Sign up to paperless billing

To sign up to receive your council tax bill by email you will need:

- Your council tax account number
- A valid email address

Your details

Street name or postcode *

[   ]

⚐ **Where can I find my council tax account number?**
Your council tax account number is 7 digits long and you can find it on your council tax bill or council tax reminder.

Council tax account reference *

[   ]

The outcome – successes and challenges

The project has had a significant impact on the number of self-serve customers for revenues services and has been credited internally as a huge success in achieving channel shift in this area. The project's achievements include:

- over £84,000 savings

- increased income of nearly £85,000

- 36 per cent increase in self-serve web traffic for revenues services

- one third of all customers that visit the website for information relating to council tax now opt to self-serve

- 400 per cent increase in customers registered for paperless billing

- 66 per cent of direct debits and moves processed online

- 96 per cent of customers rate the service good or above

- 15 per cent increase in customers on direct debit

- 0.19 per cent increase in collection rates thanks to direct debit uptake

- 35 per cent of forms completed outside office hours.

Following on from the success of customers registering for paperless billing, the team amended council tax bills in March 2018 to include the link to sign up for direct debit payments.

That month 500 people signed to pay their council tax by direct debit using the fully integrated form with automated processing through to the back office. Without the form, if those 500 people had wanted to set up a direct debit, they would have had to call in to the revenues service – at the busiest time of the year for officers.

Indeed, in the council tax period following implementation of the new forms, the revenues team was in a unique position for that time of year – no backlog.

> "The project has been hugely successful. After our first implementation of the e-billing campaign, e-billing went up 400 per cent in the first couple of weeks. We've had 66 per cent of customers that are set up on direct debit choosing to do that through the online form."
>
> **Fraser Trickett, Senior Business Analyst**

This released capacity has meant that the revenues team has been able to cope with a significant increase in workload as a result of a large building programme in North Kesteven coming to fruition. The programme is looking to extend the number of homes in the area by 40 per cent over five years yet the revenues team has been able to cope thanks to the online forms and automated processing.

At the start of the new academic year in 2018 landlords were able to submit information via the new forms. With 1,500 properties and 9,000 students this has traditionally been a busy time but this year all student landlords had their exemptions in place for the start of the academic year.

> "Each form that's completed is less work for officers – and not just in the council tax office but if someone has filled in a piece of paper and written in the details that goes to an officer who has to scan it into the workflow and it then has to go to the appropriate person who has to pick it up – the whole thing just magnifies. And it allows you to capture so much information like email addresses that you don't get in letters."
>
> **Bob Wagstaff, Council Tax Team Leader**

Financial benefits

Thanks to the baselining information gained during the original service review and ongoing measurement and monitoring the council has been able to calculate total benefits of £184,000, from increased income and cost avoidance, and £84,000 in efficiency savings from this project.

Future savings have been estimated at almost £45,000 per annum. However, because the number of users is increasing daily the council sees ongoing savings 'as an upward trend'.

From the point at which different forms went live in December 2018 the project delivered the following savings:

Automated transactions

£52,700 has been saved from use of the forms and automated processing since implementation to December 2018, with a minimum rate of ongoing monthly savings of £3,350 expected. (staff time processing transactions benchmarked by the council at 38p per minute).

- direct debit:
    - o 3,113 transactions saving £12,327.48
    - o future savings of £993.96 per month ongoing based on an average of 251 transactions.
- move form:
    - o 6,338 transactions partially automated saving £12,676
    - o 4,190 transactions fully automated (since Feb 18) saving £17,220.90
    - o future savings of £1,578.24 per month ongoing based on an average of 384 transactions.
- paperless billing:
    - o 3042 transactions saving £6,084
    - o future savings of £276 per month ongoing based on an average of 138 new applications.
- student move form:
    - o 840 forms completed reporting 3,053 moves saving £4,396.32

"If you look at the indicators about the number of people we've managed to get on the direct debit, the processing times and the levels of customer satisfaction, the reduction in people ringing us up and involving our staff in the labour-intensive business of dealing with queries on the phone – all of those indicators are very positive and show that the project has been remarkably successful."

Councillor Ric Metcalfe, Leader of the Council

- o future savings of £4,500 per annum ongoing given expected student numbers.

Released capacity

The capacity released within the team as a result of these automated transactions resulted in a reduced backlog at the financial year-end which released 2.5 FTEs for 2 weeks. This can be quantified as an efficiency of £3,964.

Postage

Over £11,000 in postage has been saved by the switch to paperless billing:

- 15,541 e-bills sent to Lincoln residents, saving £7,770.50
- 6,816 e-bills sent to North Kesteven residents, saving £3,408
- future savings £508 per month ongoing based on an average 1,016 new paperless bills sent per month.

Channel shift savings

A 15 per cent reduction in contact across all channels over a six-month period equated to 4,365 fewer contacts compared to the previous year giving a saving of £16,478.

Improved collection rates

Across both councils, collection rates from 2017 to 2018 improved by 0.19 per cent, equating to an additional £84,819 of revenue income.

Cost avoidance

Developing in-house XML skills avoided the use of external consultants costing in the region of approximately £15,000.

Non-financial benefits

- capacity released through automation has meant that increased workloads from local building programmes have been manageable within existing staffing levels, avoiding any need for new hires and overtime

- staff have more time to deal with complex cases, vulnerable people and those who do not wish to use digital self-service

- direct debit set-up has been reduced from 13.17 days to an instant

- move processing times have been reduced from 75.11 days to 18.4 days

- staff are more satisfied in their work and the service they provide according to staff surveys

- customers receive a better service and greater access to information and services

- customers like the new service and have been complimentary in their feedback comments, rating the new services 4.5 stars out of five

- accessible self-service has improved both councils' reputation according to customer feedback.

Challenges

The team found that gaining time from the revenues team away from 'the day job' to work with, inform and test the forms was a challenge as people were under time pressures and dealing with a high-volume workload. With the team committed to ensuring that forms were thoroughly tested ahead of go-live this caused some minor delays in production. This was a particular challenge around peaks in workload relating to student move changes and annual billing.

As a shared service the team needed to create forms branded for each council. However, as Lincoln held the licence for Firmstep their branding was automatically applied across all forms. The team successfully addressed this problem by applying their own in-house skills in JavaScript (a web programming language).

> "It frees up capacity and time for those customers who can't self-serve or don't want to do so or have more complex needs and so it allows us to deal with them in a more appropriate way. We recently had people who applied for their direct debits at 2.00 am – they wouldn't have been able to do that before, but if that's what their lifestyle is then now they can."
>
> **Angela Andrews, Chief Executive**

Customer comments

> "Very smooth and easy to navigate the website. Clear what details were needed."
>
> "Incredibly efficient service."
>
> "Awesome service. Love being able to manage my council tax online."
>
> "Easy to do – I'm all for saving trees!"
>
> "Uncomplicated and straightforward, the way it should be. Well done."
>
> "Quick and easy, why can't everything in life be this simple?!"

They were able, behind the scenes and with Firmstep's permission, to create a script that detected which council a form related to and to pull in the correct branding each time.

As part of the annual council tax billing process in March 2017 an upgrade to the back-end NPS system was required in order to meet legislative requirements. Unfortunately, due to some technical issues, there was a longer period of downtime than expected. However, the team

> "The problem from our side was availability of time for testing that could be committed from the council tax team. Again a lesson learnt from that would be to set aside specific time for that testing."
>
> **Fraser Trickett, Senior Business Analyst**

took the opportunity "to grab the council tax admin team" and work on developing a new form for landlords to report changes in their properties – although not part of the original plan the team successfully turned a challenge into an opportunity.

Despite transactions going through successfully, a BACS (Bankers' Automated Clearing System) validation issue and associated warning messages were encountered. These are related to the NPS solution, however, and could not be resolved by the project team.

Unfortunately, Firmstep upgraded their product set during the project, which removed some functionality vital to the components the team was looking to implement. Through contacts made within the Firmstep customer network and at LGA channel shift programme workshops, the team realised that a number of other councils were facing the same issue. This issue was discussed with the LGA and other councils facing the same issue and the LGA agreed to support these councils by raising directly it with Firmstep. The issue was subsequently resolved.

"When we went to LGA conferences a lot of people that we were speaking to were using Firmstep and were raising similar concerns to us relating to the upgrade. The LGA were great and they were able to unite our voices into one and get Firmstep to do something to help us."

David Gott, Business Analyst

Key learning points

Involve everyone: we involved both service users and staff in this project and found that taking people with you on a transformation journey is important. Staff must see the project as an opportunity, not a threat – as a service improvement rather than a cost-cutting exercise. There was initial resistance in some teams but delivering the evidence that technology can reduce admin time and let them keep up with demand and release capacity was important.

Book time in for testing: ensuring that service teams have time for testing scheduled within their 'day job' is essential for keeping product releases on track. And schedule testing time to avoid known annual peaks in workloads.

Building in-house skills is 'an excellent idea': it helps in terms of retention of staff, morale within the team and voids the need to buy in consultants, for example, to undertake integrations. The skills can also be reused on future projects, so are a good long-term investment.

Engage with product user groups: Firmstep had created a customer network which had a positive impact on the project. The Lincoln team was able to communicate with other councils using the product set to help them with their own use of XML and grow their knowledge base.

Learn from other councils and specialist areas: the team found regular meetings with both councils' multimedia teams useful in

> "As a local government community we need to learn from each other. We have different geographies, different populations but our needs are very, very similar. That's why I think these LGA projects are important to actually share learning. Leadership is also incredibly important for focus, direction, authority to deliver and permission to deliver – it is important for our guys to know that it won't be wasted work and that it will be implemented."
>
> **Angela Andrews, Chief Executive**

> "It is an excellent idea to develop skills in-house. It helps in terms of retention of staff and morale within the team – you feel a more valued employee and your skills and opportunities are being recognised. And from the authority's perspective it means you're not buying in consultants at every turn for integration."
>
> **Fraser Trickett, Senior Business Analyst**

> "Do it yourself – don't get third parties in but invest in your staff and believe in your staff whether you have to make a new post even to get someone who can do those skills you'll be a lot better for it if you can get those skills in-house and once you've done one project the rest just fall into place."
>
> **David Gott, Business Analyst**

expanding their own skills, and found the process an excellent channel for skills transfer between the two councils.

Robust error handling: the team quickly realised the importance of robust error and anomaly handling. Early on in the project, processes were put in place so that any issues were flagged to a named officer for fast resolution.

Do not develop in isolation: efficiencies and service improvements available through cross reference with other council services enabled the team to deliver significant benefits. For example, cross-selling the council tax self-service opportunities on the application forms for the garden waste service.

Promote the self-service option: successfully promoting the availability of self-service options is essential in order to drive take-up. You need to be innovative in your approach in relation to target user segments. For example, in driving uptake in a relatively small segment, student landlords, the team contacted all landlords and successfully explained the speed of turnaround available via self-service, compared to the timescales involved in the traditional process and subsequent delay in service delivery.

Next steps

City of Lincoln is now using the skills that it has developed during this project to look at its data in different ways in order to better understand customer journeys through its website. Once issues and opportunities for improvement or development of new self-service channels are identified, these skills will be used to deliver improvements in an ongoing process – "there are lots more forms that we can link into the back office".

Further opportunities to use technology and customer journeys to cross-sell and promote uptake of self-service are also to be investigated.

Following on from the success of this project departments across the council are asking the team for help in developing self-service options for their service areas. One service flagged for investigation is housing repairs which generates high workloads for Lincoln's contact centre. This has been prioritised for the development of online self-service. Other issues also flagged up include the development of 'severely mentally impaired discounts', and expansion of the direct debit forms and types of moves that can be reported.

"We have a bigger list now of things we want to do but we have some well-developed in-house skills and some proven outcomes to work from and apply across the organisation."

Angela Andrews, Chief Executive

"It's quite clear that this has an application right across the council, there are lots of other fairly labour-intensive activities that the council has to undertake. I am absolutely certain there's going to be some real gains here for us – particularly as we've done this in-house. We trained up our own staff and that skills transfer has been critical in the next step of being able to apply this across the council."

Councillor Ric Metcalfe, Leader of the Council

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Contact for further information

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